



# EEO-1 Survey User's Guide

Version 1.2

# TABLE OF CONTENTS

Screen 2

<b>Starting Your EEO-1 Survey</b>	.....	<a href="#">Screen 4</a>
Logging in	.....	<a href="#">Screens 5-8</a>
<b>Preliminary Information Collection</b>	.....	<a href="#">Screen 9</a>
User identification	.....	<a href="#">Screens 10-11</a>
Company identification	.....	<a href="#">Screen 12</a>
Survey eligibility	.....	<a href="#">Screens 13-15</a>
Updating closed establishments	.....	<a href="#">Screens 16-18</a>
Selecting a filing method	.....	<a href="#">Screen 19</a>
<b>Filing Via the “Upload Data File” Method</b>	.....	<a href="#">Screen 20</a>
Downloading your establishment listing	.....	<a href="#">Screens 21-24</a>
Navigating to the upload screen	.....	<a href="#">Screens 25-30</a>
Uploading your file	.....	<a href="#">Screens 31-40</a>
Errors and warnings	.....	<a href="#">Screens 41-46</a>
Reviewing uploaded information	.....	<a href="#">Screens 47-49</a>
Certifying	.....	<a href="#">Screens 50-52</a>
<b>Filing Via the “Complete Online Form” Method</b>	.....	<a href="#">Screen 53</a>
Establishment list screen	.....	<a href="#">Screens 54-56</a>
List of report types	.....	<a href="#">Screens 57-65</a>
Entering your data	.....	<a href="#">Screens 66-78</a>
Adding a new establishment	.....	<a href="#">Screens 79-84</a>



# TABLE OF CONTENTS

Screen 3

Deleting an establishment	.....	<a href="#">Screens 85-89</a>
Certification	.....	<a href="#">Screens 90-93</a>
Reconciliation report	.....	<a href="#">Screens 94-96</a>
Special procedures	.....	<a href="#">Screens 97-98</a>
<b>Filing for the First Time</b>	.....	<a href="#">Screen 99</a>
Navigate to registration page	.....	<a href="#">Screen 100</a>
Registration questionnaire	.....	<a href="#">Screens 101-106</a>
Registration form	.....	<a href="#">Screen 107</a>
Registration confirmation	.....	<a href="#">Screen 108</a>
<b>Alternate login scenario</b>	.....	<a href="#">Screen 109</a>
Get company number	.....	<a href="#">Screens 110-111</a>
Update contact person	.....	<a href="#">Screen 112</a>
Get password	.....	<a href="#">Screens 113-116</a>
<b>Appendix</b>	.....	<a href="#">Screen 117</a>
Acquisitions	.....	<a href="#">Screens 118-121</a>
Mergers	.....	<a href="#">Screens 122-123</a>
Spinoffs	.....	<a href="#">Screens 124-125</a>
Regarding PEOs	.....	<a href="#">Screens 126-128</a>
Troubleshooting/FAQs	.....	<a href="#">Screens 129-132</a>
Additional resources	.....	<a href="#">Screen 133</a>



# Starting Your EEO-1 Survey

Screens 4 – 8

## Logging in


To begin filing your survey, proceed to the EEO-1 login page here:

<https://egov.eeoc.gov/eo1/login.jsp>

Login ID/Company Number:  [Help!](#)

Password:  [Help!](#)

Retype the characters from the picture:



[Login](#)

[Get Password](#) [Forgot Password?](#) [Forgot Company Number?](#)

**\*If your company is filing for the first time, refer to [Screens 99 – 108](#).**


## Login page

The login page requires you to enter your login ID/company number and your temporary password and press “Login” to start your EEO-1 survey. Your login ID/company number and temporary password are included in your 2018 EEO-1 notification letter. Your 2017 password will **NOT** carry over into 2018 EEO-1 survey.

Login ID/Company Number:  [Help!](#)

Password:  [Help!](#)

Retype the characters from the picture:



[Login](#)

[Get Password](#) [Forgot Password?](#) [Forgot Company Number?](#)

**Note:** If you have not received your 2018 notification letter please refer to [Screens 109-116](#) for an alternate login procedure with directions on how to obtain your company number/login ID and password to login.

### Logging in

When logging in for the first time, you will be directed to create a permanent password for the survey year. Enter your company number/login ID, and create your new password. Reenter your new password in the “Confirm New Password” field, then click “Submit Password” to finish creating your password.

### Create Password

Enter your Company Number/Login ID, and create a new password below.  
The password must be at least

- 8 characters
- 1 number
- 1 lowercase letter
- 1 uppercase letter
- 1 special character

Once created you can click on "Login" to login to your EEO-1 Survey.

Company Number/Login ID	<input type="text"/>
New Password	<input type="password"/>
Confirm New Password	<input type="password"/>

Submit Password

### Logging in

Upon proceeding you will be presented with the Standards and Rules of Behavior for the 2018 EEO-1 Survey. After reading it, check the box and press next to accept the conditions and comply with the rules and proceed further with the survey.

**Standards and Rules of Behavior for the use of the U.S. Equal Employment Opportunity Commission (EEOC) EEO-1 data collection system.**

Access to and continued use of EEO-1 is granted on the condition that each user read and follows the Commissions policies concerning the use. Hereafter, use of this system is dependent upon the user following this guidance:

1. Access to the EEO-1 is controlled. Requests for access must be justified based on job requirements. The system is to be used only for the purposes of filing your company's EEO-1 report(s) and the retrieval of EEO-1 reports filed in previous years.
2. Accounts are provided to permit access only to authorized users for authorized purposes. Unauthorized use of a user account includes, but is not limited to: the use of a user account to access EEO-1 data by any person other than the authorized user; attempts to retrieve or modify information that is not your own; and destruction or tampering with government information. Users shall not seek information on data, files or passwords belonging to others, or otherwise attempt to gain unauthorized access to EEOC systems.
3. The system is only to be accessed using the procedures prescribed by the U.S. EEOC and only by using the Login ID and Password and provided by the U.S. EEOC.
4. Any use of the system which disrupts the operation or use of the system is prohibited.
5. Users shall not do any unauthorized security scanning, monitoring, or data interception, nor should they interfere with the conduct of security measures (such as anti-virus or auditing).
6. Unauthorized access or use may be subject to civil and criminal penalties for computer fraud or abuse. If you suspect or become aware of unauthorized use or access, you must notify the U.S. Equal Employment Opportunity Commission IMMEDIATELY by telephone, 1-877-392-4647 (toll-free); fax: 202-663-7185 or email: [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov).

☐ I accept these conditions and will comply with these rules.



# Preliminary Information Collection

Screens 9 – 19

Now that you have logged in, you will provide some preliminary information. This information will update any major changes to your company since the previous EEO-1 survey.

### User identification

Provide the name and title for the company official who is certifying your survey.

A certifying official refers to any employee in your company tasked with certifying that your submitted survey information is accurate.

**Preliminary Information Collection**

Please update your Company's identifying information below

**Certifying Official**

Name* ⓘ	Title* ⓘ
<input type="text"/>	<input type="text"/>

**Contact Person**

Name* ⓘ	Title* ⓘ
<input type="text"/>	<input type="text"/>
Telephone Number (including Area Code)* ⓘ	Extension (Optional) ⓘ
<input type="text"/>	<input type="text"/>
Email* ⓘ	
<input type="text"/>	



### User identification

Provide the name, title and contact information for your company's contact person.

The contact person is the individual whose e-mail is linked with the EEO-1 survey and is your company's contact for the EEOC Employer Data Team.

Please update your Company's identifying information below

#### Certifying Official

Name* ⓘ	Title* ⓘ
<input type="text" value="EXAMPLE"/>	<input type="text" value="EXAMPLE"/>

#### Contact Person

Name* ⓘ	Title* ⓘ
<input type="text" value="EXAMPLE"/>	<input type="text" value="EXAMPLE"/>
Telephone Number (including Area Code)* ⓘ	Extension (Optional) ⓘ
<input type="text" value="(555) 555-5555"/>	<input type="text"/>
Email* ⓘ	
<input type="text" value="EXAMPLE@EEOC.GOV"/>	



### Company identification

Enter your company's Employer Identification Number (EIN) and Dun and Bradstreet number (if applicable). When updating the address, suggested addresses will be provided. Continue to complete until the correct address appears. Click on this address to continue. If the correct address does not appear, or if you are entering a P.O. Box, click on "Manual Address Entry" and enter the address in the provided cells.

The screenshot shows a web form for company identification. At the top, there are two fields: "Establishment for which this report is filed" with the value "TEST SITE" and "Employer Identification Number (EIN)" with the value "26-6666666". Below these is a text box with instructions: "If you need to update the establishment's address, begin by entering the full address in the Address 1 cell. As you enter your address, suggestions will be provided. Continue to add information until your address appears in the drop-down list. Select your address to continue. If the correct address does not appear, or if you are entering a P.O. Box, please click on 'Manual Address Entry' and enter the address in the provided cells." Below the instructions is a section titled "Address (Use Manual Entry for P.O. Box)". It contains a large text box for "Address (number and street) - Note: Second line is optional" and a smaller box for "Address 2 (Optional)". Below these are four fields: "City or Town", "County", "State", and "Zipcode". At the bottom of the form, there is a button labeled "Manual Address Entry" which is circled in red.

**Click this to input address manually**

### Survey eligibility

Q1: Select “Yes” if the entire company has at least 100 employees in the pay period for which you are reporting. Select “No” if not.

Q2: Select “Yes” if your company is affiliated with another company through common ownership/centralized management, bringing total employment to at least 100 employees. Select “No” if not.

Q3: Select “Yes” if the company or any of its establishments (a) have 50 or more employees AND (b) is not exempt as provided by 41 CFR 60-1.5, AND either (1) is a prime government contractor or first-tier subcontractor, and has a contract, subcontract, or purchase order amounting to \$50,000 or more, or (2) serves as a depository of Government funds in any amount or is a financial institution which is an issuing and paying agent for U.S. Savings Bonds and Savings Notes. Select “No” if not.



### Survey eligibility

If you selected “Yes” to any one of the above questions, you will be eligible to complete the survey. Continue to [Screen 16](#). However, if you are a single-establishment company, go to [Screen 67](#).

If you selected “No” to all three questions, give reasons by selecting from the drop down menu and proceed to [Screen 15](#).

Please select a primary reason

Please select a primary reason

N1 - No Change from Previous year

N2 - Reduction in Staffing

N3 - Portion of business spunoff to form independent company

N4 - Entire business or portion of business was acquired by another company

N5 - Entire business or portion of business was merged by another company

N6 - Company no longer exists

N7 - Asset Acquisition

N8 - Bankruptcies

Other (Reason)



### Survey eligibility

You are not required to file the 2018 EEO-1 Survey. Please complete the certification below.

Certifying Official	OFFICIAL
Title	OFFICIAL HR
Total Number of Reports	79

Certification
<input type="checkbox"/> All statements are accurate and were prepared in accordance with the instructions.
<div>Cancel</div> <div>Certify</div>
<small>All reports and information obtained from this report will be kept confidential as required by section 709(e) of Title VII. Willfully false statements on this reports are punishable by law, U.S. Code, Title 18, Section 1001.</small>

If you answered “No” to all of the survey eligibility questions, you will not be required to complete the reporting year’s survey. Verify that all the information listed on this screen is correct. Check the box if you think your company will not meet the requirements to file the EEO-1 report next year. Finally, check the box under “Certification” to confirm that everything is accurate. Click the “Certify” button to complete your report for the year.



## Updating closed establishments

1. Has your company closed any establishments since last survey filing?

☐ Yes ☐ No

On this screen you will provide the answer regarding the status of your establishments.

If any establishments have closed or are no longer in operation since the previous survey, you will select “Yes” and proceed to [Screen 17](#).

If no establishments have closed since the previous survey you will select “No” and proceed to [Screen 19](#).



### Updating closed establishments

You will be presented with a list of establishments from the previous year's survey. Please select all establishments that should be removed and not included in the current year's survey.

<input type="checkbox"/> Please select a primary reason ▼	4	GX9119	EUREST SECTOR 9356	1465435	NY	SKANEATELES FALLS
<input type="checkbox"/> Please select a primary reason ▼	4	GX9120	WOLFGANG PUCK CATERING SE 20367	86451	CA	LOS ANGELES
<input type="checkbox"/> Please select a primary reason ▼	4	GX9121	CHARTWELLS SECTOR 11989	601 W STADIUM BLVD	MI	ANN ARBOR
<input type="checkbox"/> Please select a primary reason ▼	4	GX9122	CHARTWELLS SECTOR 18418	1005 STATE STREET	IL	EAST SAINT LOUIS
<input type="checkbox"/> Please select a primary reason ▼	4	GX9123	BON APPETIT SECTOR 18169	56255	OH	CLEVELAND



## Updating closed establishments

If your company has closed establishments since the previous filing year, select the option that best explains why it has closed.

Check closed location		Type ▲	Establishment Number ◆
<input checked="" type="checkbox"/>	Please select a primary reason ▼	4	DF20808
<input type="checkbox"/>	This Establishment Closed/This Establishment is Out of Business		
<input type="checkbox"/>	This Establishment is now spun-off and is now independent of this company		
<input type="checkbox"/>	Closed as Type-4 and Required in Type-6		
<input type="checkbox"/>	This Establishment was consolidated into another Establishment or was a client site		
<input type="checkbox"/>	This Establishment was involved in an acquisition or merger.		

### Selecting a filing method

Select one of the following methods for completing your EEO-1 Survey.

**EEO-1 Survey Data Filing Option**

Do you want to file the application online or upload data file?

☐ Complete Online Form

☐ Upload Data File

“Complete Online Form” refers to filing via the online form. You will enter data manually into fillable cells. See [Screens 53 – 98](#).

“Upload Data File” refers to filing via data file transfer. Filing with this method involves uploading a file prepared on your Human Resource Information System (HRIS) into the EEO-1 Survey system. See [Screens 20 – 52](#).



# Filing via the “Upload Data File Method”

Screens 20 – 52

If “Complete Online Form” was selected, use [Screens 53 – 98](#) instead.

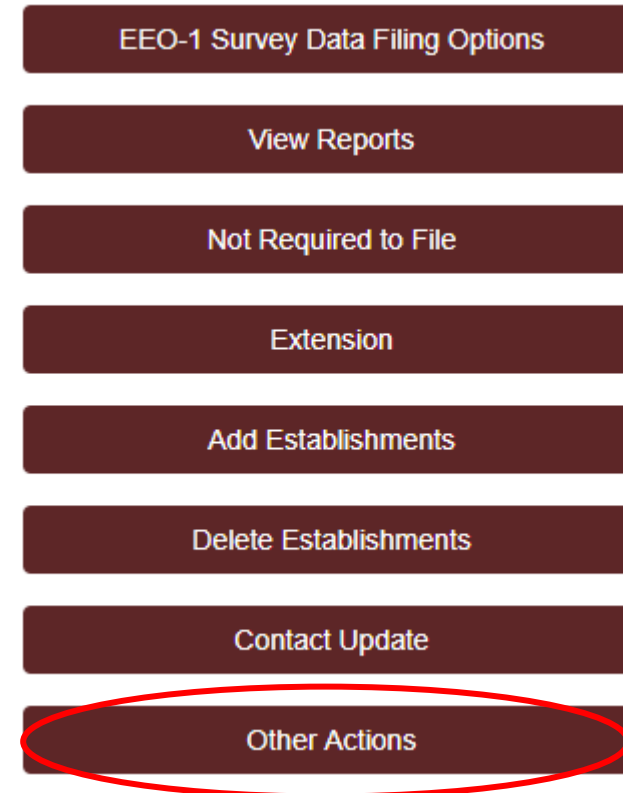
## Downloading your establishment listing

Before generating the upload file, you should first update the establishment numbers in your HRIS. You can download the current year's establishment listing from your company's EEO-1 online database.

If you have already updated your establishment numbers, proceed to [Screen 27](#).

## Downloading your establishment listing

After logging in, click “Other Actions”.



### Downloading your establishment listing

Under “Present Year Reports”, click “All Establishments”.

Utilities	
Uncertify	Uncertify reports.
Convert	Convert from a single-establishment employer to a multi-establishment employer.
Previous Year Reports	
New Establishment	Listing of all establishments filed for the first time in the previous year.
All Establishments	Listing of all previous year establishments.
Present Year Reports	
All Establishments	Listing of all establishments in the present year.
Check Totals	Present year employee totals for all establishments.

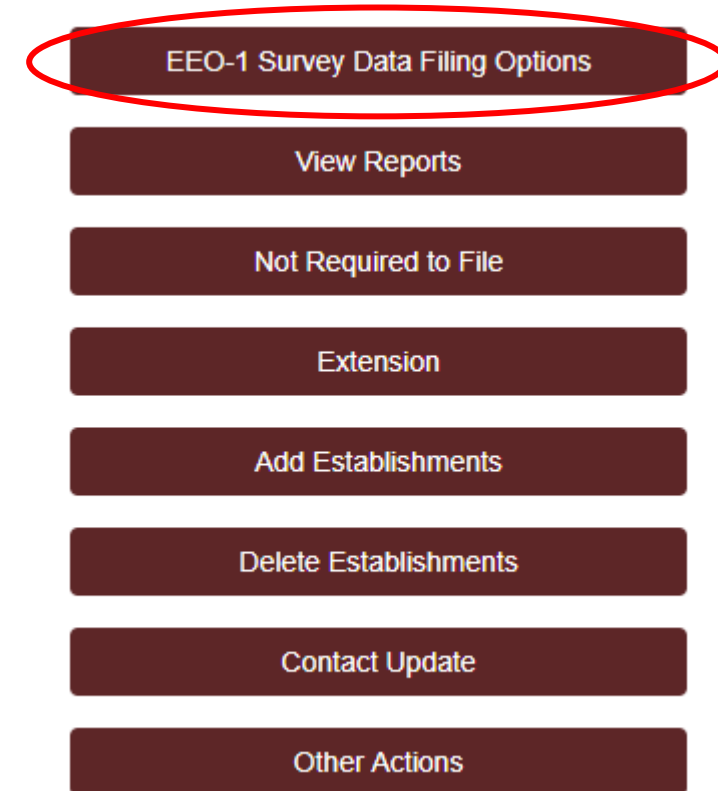
## Downloading your establishment listing

A list of your current establishments will appear. Establishment numbers are located to the left of each establishment row. You may refer to these establishment numbers when ensuring that the numbers in both the company EEO-1 database and your company's HRIS match.

List of All Present Year Establishments									
<div>Back</div> <div>Print</div> <div>Download to Excel</div>									
Estb #	Type	Establishment Name	Street	City	State	Zip	County	NAICS	Total
GX94201	2	TEST SITE	14601 SNELLING ROAD	SNELLING	CA	95369	MERCED		
GX94201	3	TEST SITE	14601 SNELLING ROAD	SNELLING	CA	95369	MERCED		

### Navigating to the upload screen

On the main menu screen after you log in, click “EEO-1 Survey Data Filing Options”.



## Navigating to the upload screen

**EEO-1 Survey Data Filing Option**

Do you want to file the application online or upload data file?

☐ Complete Online Form

☐ Upload Data File

Select “Upload Data File”, then click “Next”. Answer the questions that follow.

## Navigating to the upload screen

### Data File Upload

EEO-1 data files must be tested before they can be uploaded to production. The following process tests the file and once validated, it allows you to upload the file directly to production. Post testing, you might see errors and/or warnings messages. You have to fix the errors before the data can be moved to production. Kindly note that uploading the file here is not the final submission.

Please answer the questions below to proceed.

1. Have you updated the establishment numbers in your Human Resource Information System (HRIS) PRIOR to creating and uploading the data file?

☐ Yes ☐ No

If you answered “No”, the system will not let you continue. You must update the establishment numbers in your HRIS before uploading.  
(See [Screens 21 – 24](#) for help with this.)



## Navigating to the upload screen

2. Has your company experienced a merger or any acquisitions?

☐ Yes ☐ No

If you answered “Yes”, the system will not let you continue. Mergers and acquisitions should be handled prior to uploading your file. Send an email to [E1.ACQUISITIONSMERGERS@EEOC.GOV](mailto:E1.ACQUISITIONSMERGERS@EEOC.GOV) with the subject line “Acquisition/Merger” regarding the details of the acquisition(s) and/or merger(s).

(For more information regarding acquisitions and mergers, see [Screens 118 – 121.](#))



## Navigating to the upload screen

3. Has your company deleted 50 or more locations since the previous year's EEO-1?

☐ Yes ☐ No

If you answered “Yes”, once your file is uploaded, you can close these establishments manually or by emailing a .CSV file including the establishment numbers of all closed establishments to [EEO1.Upload@eeoc.gov](mailto:EEO1.Upload@eeoc.gov).



## Navigating to the upload screen

Once you have answered all of the questions, click “Next” to continue.



Clicking “Cancel” will take you back to the data filing options screen.

## Uploading your file

Select which data file type you will be uploading (click the “Detail” or “Summary” link next to each file type for an example).

**Upload File Here**

Step 1: Select the type of data file you are uploading. Type of data file (for definitions see below)

**Fixed Length**

- ☐ DATA FILE 1 [\(Detail\)](#)
- ☐ DATA FILE 2 [\(Summary\)](#)

**Comma Separated**

- ☐ DATA FILE 3 [\(Summary\)](#)
- ☐ DATA FILE 4 [\(Detail\)](#)

## Uploading your file

### **DATA FILE 1**

Data File 1 is a fixed-length file and must be in an ASCII/TXT format.

## Uploading your file

### DATA FILE 1

For **single-establishment companies**, there will be only one data record in the data file indicated as Type/Status Code-1.

For **multi-establishment companies**, Data File-1 includes data records for Type/Status Codes 2,3,4,9 and 8 (Type/Status Codes 8 are used if the employer is not submitting Type 6 records for the establishments employing fewer than 50 employees). Type/Status Code 9 data records are for establishments reporting for the first time in the current year's EEO-1 survey. Type/Status Code 8 data records are for establishments employing fewer than 50; however, employment data categorized by race/ethnicity, gender and job category must be provided for each Type/Status Code 8 data record.



## Uploading your file

### **DATA FILE 2**

Data File 2 is a fixed-length file and must be in an ASCII/TXT format.



## Uploading your file

### DATA FILE 2

This file is used for establishments with less than 50 employees. Multi-establishment employers can use this to create Type 6 reports. The file is of fixed length and is usually extracted from the company's payroll system.

**NOTE:** Before uploading this file, the system will delete any Type 6 reports that were uploaded or entered for this year's survey.



## Uploading your file

### DATA FILE 3

Data File 3 contains the same information as "Data File 2", but is in a Comma-Separated Values (CSV) delimited format that can be created from almost any spreadsheet program. This may be the easiest and quickest way to enter "Type 6 Reports" for Establishments with less than 50 employees.

**NOTE:** Before uploading this file, the system will delete any Type 6 reports that were uploaded or entered for this year's survey.



## Uploading your file

### **DATA FILE 4**

Data File 4 contains the same information as "Data File 1", but is in a Comma-Separate Values (CSV) delimited format that can be created from almost any spreadsheet program.



## Uploading your file

Click “Choose File” and select the file you want to upload.

**Step 2: Select your file** (This may take a few minutes depending on the size of your upload. If you are unable to upload a data file this could be due to an issue with your company's firewall. If you encounter this issue be sure to speak to your Network Administrator or IT professionals to resolve it.)

Choose File No file chosen

**Step 3: Continue to Next Step**

Continue



## Uploading your file

**NOTE:** EEOC only accepts .txt and .csv file formats for data uploads.

If you are unsure about how to format your data file for upload, or if you want more information about EEO-1 data files, navigate to [www.eeoc.gov/eo1survey](http://www.eeoc.gov/eo1survey) and locate the links under the heading “Data File” in the callout box titled “Alternate EEO-1 Reporting Formats” on the left hand side of the page.

**File format specifications**



## Uploading your file

Navigate to the folder on your computer where your company's data file is located, and select the file.

Step 2: Select your file (This may take a few minutes depending on the size of your upload. If you are unable to upload a data file this could be due to an issue with your company's firewall. If you encounter this issue be sure to speak to your Network Administrator or IT professionals to resolve it.)

Choose File | No file chosen

Verify this is the correct file

Step 3: Continue to Next Step

Continue

The name of the document you chose for uploading will appear next to the "Choose File" button so you can ensure you have selected the correct document. If the file is correct, click "Continue" to move to the next step.

## Errors and warnings

There are four possible results to the test.

1. There are errors and warnings in your file.
2. There are errors in your file.
3. There are warnings in your file.
4. There are no errors or warnings in your file.

These results will be accompanied by a list of errors and or warnings in the data file you chose for testing. You must correct the *errors* in the file before uploading. The *warnings* can be corrected either in the file or later in the electronic system. All records without warnings or errors are marked as “OK”.



## Errors and warnings

Go through the list of errors/warnings and correct them in the original file for upload.

Example of an error in the uploaded test file.



Need help with errors? Read the “EEO-1 Data Upload Error Fact Sheet” located on <https://www.eeoc.gov/employers/eo1survey/data-upload-error.cfm>

## Errors and warnings

At the bottom of the warning/error report, you can see the total count of establishment reports that are OK, that have WARNINGS, and that have ERRORS.

You can print this warning/error report for your reference by clicking the “Print This Page” button.

[Back to Test File](#) [Print This Page](#)

\*\*\*\*\*  
You will See 'ERROR'/'WARNING' messages reported from the system  
\*\*\*\*\*

Line 1: **ERROR - Trying to upload Invalid Data**

\*\*\*\*\*

Total Establishment Reports OK are : " 0 "  
Total WARNINGS are : " 0 "  
Total ERRORS are : " 1 "  
\*\*\*\*\*

[Back to Test File](#) [Print This Page](#)

↑  
Click to test again

↑  
Click to print

## Errors and warnings

Before uploading the file for re-test, the records with errors must be corrected or removed from the file.

Click the “Back to Test File” button to re-test the data file once you have corrected the errors in your file.

**NOTE:** If you remove the records with errors from your file they must be entered manually using the online form’s filing method. (See [Screen 53](#).)



## Errors and warnings

Once you have fixed all of the ERRORS in your file and uploaded it for testing again, you might still have some WARNINGS. **This will not impede your ability to upload the file. However, you will still have to fix these warnings in the online form before certifying your report.**



## Errors and warnings

Once all of the ERRORS have been fixed in your file, scroll to the bottom of the ERRORS/WARNINGS screen and click “Continue to Next Step” to load the data from your file into the EEO-1 online system.

Error Free

\*\*\*\*\*  
Total Establishment Reports OK are : " 1 "  
Total WARNINGS are : " 1 "  
Total ERRORS are : " 0 "  
\*\*\*\*\*

Back to Test File    Print This Page

Continue to Next Step

Click to continue

### Reviewing uploaded information

On this page you will be able to see information about the establishments that were included in your data file.

EEO-1 Data File Upload

Report Status	
Status	Description
I	Incomplete due to Warnings in Error Report. Establishments marked incomplete must be corrected after continuing to the next step and before certifying.
C	Complete

Your data has been tested and is ready for the next step. However, once you continue, you will not be able to upload data for these establishments again. [You will still be able to edit the data manually using the online system.](#) Additionally, you will still need to certify the report. Do you want to continue?

☐ Yes, please continue.

[Continue To Next Step](#)

Status	Type	Establishment Number	Year	Establishment Name	Street	City	State	Total
I	3		2018					

**NOTE:** Once you click “Continue to Next Step”, you will *not* be able to upload data for the establishments listed on this page again. But, you *will* be able to edit the data manually using the online form, and you still have to CERTIFY the report.

## Reviewing uploaded information


Once you have reviewed the information on this page, read the disclaimer message, check the “Yes, please continue” box and click “Continue to Next Step”. *THIS WILL ONLY UPLOAD YOUR DATA TO THE EEO-1 ONLINE SYSTEM. You still have to CERTIFY your report!*

Your data has been tested and is ready for the next step. However, once you continue, you will not be able to upload data for these establishments again. **You will still be able to edit the data manually using the online system.** Additionally, you will still need to certify the report. Do you want to continue?

☒ Yes, please continue. — **Must be checked to continue**

**Continue To Next Step** — **Click to continue**

### Reviewing uploaded information

You will now see your data in the online filing system's "Edit EEO-1" screen. You can add, delete, or modify any information present on this screen manually. Every establishment marked with an  must be completed. This can be done by selecting edit and completing the information or deleting it if it no longer exists.

#### Edit and Complete Establishment Reports

To certify your EEO-1 survey you will first have to complete each of your establishments. **Type 2 Consolidated Report will be the last to complete before certification.** When establishments are complete they will be marked with a **green "C"** in the Status column, whereas incomplete reports will be marked with a **red "I"**. When you are ready to complete information for a specific establishment please select "Edit" from the drop-down menu located directly to the left of the establishment number you would like to complete and press the "Go" button located next to this drop-down menu.

#### Delete Establishment:

If you need to delete an establishment please select "delete" from the drop down menu located directly to the right of the establishment number you would like to delete and press the "Go" button located next to this drop down menu.

#### Add New Establishments:

If you need to file for a new establishment please [click here](#)

Filter By Report Types ⓘ

Select All

Filter By Report Status ⓘ

Select All

I Incomplete

C Complete

Show 50 entries

Previous 1 2 Next

Showing 1 to 50 of 81 entries

Type	Status	Action	Est number	Est Name	Street	City	State	Emp Count
2	C	<div>Edit</div> <div>Go</div>		TEST COATINGS		FOUNTAIN HILL	PA	0
3	I	<div>Edit</div> <div>Go</div>		TEST COATINGS		FOUNTAIN HILL	PA	
4	I	<div>Edit</div> <div>Go</div>				RALEIGH	NC	

## Certifying

Once all establishments are marked as complete, a message will appear on the top of the screen, asking you to certify. Click “Certify Reports” to proceed with certification.

You have completed data for all establishments. Please view the consolidated report to check for accuracy. Once you have finished adding establishments and your data is accurate, please press the Certify Reports button.

Certify Reports

Click to proceed with certification

### Certifying

The certification screen will present you with a summary of your survey and a statement of certification. Check the box stating that the information you provided is accurate, then click “Certify” to finalize your EEO-1 Survey.

You MUST click the “Certify” button to submit your report, or it will be considered incomplete and therefore unacceptable for submission.

Certifying Official	TESTSAY GREENSTEST
Title	SR HR ANALYST
Total Number of Reports	81
Total Number of Closed Establishment	72

These establishments had major changes in data when compared to last year's submission:

Establishments with at least a 35% change in employee counts from previous year	1
Establishments with a substantial change from previous year regarding the ratio of Male vs. Female employees	0
Establishments with a substantial change from previous year regarding the ratio of White vs. Minority employees	1
Establishments with a substantial change from previous year in the distribution of employees in Minority categories	0

Certification

☐ All statements are accurate and were prepared in accordance with the instructions.

Cancel

Certify

All reports and information obtained from individual reports will be kept confidential as required by section 709(e) of Title VII. Willfully false statements on this reports are punishable by law, U.S. Code, Title 18, Section 1001.



### Certifying

When you see the following screen, you will know your report has been completed and certified. Your obligations for the EEO-1 Survey have been met.

**Certification Complete**

Congratulations. Certification for AB6624 is complete. Thank you for completing the 2018 EEO-1 Survey.  
Please print this certification notice for your records.

This is Certified by TESTSAY GREENSTEST on Fri Dec 14 15:30:53 EST 2018

Certifying Official	TESTSAY GREENSTEST
Title	SR HR ANALYST
Total Number of Reports	81
Total Number of Closed Establishment	72

It is suggested that you print a copy of the EEO-1 reports for your records. If, after reviewing your reports, you find an error, please call our toll free customer service number at 1-877-392-4647.

[Print](#)



# Filing via the “Complete Online Form Method”

Screens 53 – 98

If “Upload Data File” was selected, use [Screens 20 – 52](#) instead.

## Establishment list screen

If “Complete Online Form” is selected, you will be taken to a screen with a list of your establishments.

Type ^	Status ^	Action ^	Est Number ^	Est Name ^	Street ^	City ^	State ^	Emp Count ^
2	I	<input type="button" value="Edit"/> <input type="button" value="Go"/>	GE05951	TESTING CENTRAL	11491 SUNSET HILLS RD SUITE	VA	RESTON	
3	I	<input type="button" value="Edit"/> <input type="button" value="Go"/>	GE05951	TESTING CENTRAL	11491 SUNSET HILLS RD SUITE	VA	RESTON	0
4	I	<input type="button" value="Edit"/> <input type="button" value="Go"/>	GX90856	332555555555555522	42918 BITTNER SQW	VA	ASHBURN	

**NOTE:** If this is your company’s first time filing the EEO-1 survey, and your company is a multi-establishment company you will only see a Type 2 and 3 report. You must add your other establishments. as needed. The Type 2 and 3 report will show the same establishment number, name, and address, but both reports are different. See [Screens 57 – 65](#) for report type info.

## Establishment list screen

If your company is a single-establishment (i.e., only has one establishment/location), you will see only one report listed as a Type 1 report. You are only required to fill out this one report.

You will not see a listing of establishments; instead, the system will guide you through filing for your sole establishment.



## Establishment list screen

If your company is a multi-establishment (i.e., has more than one establishment/location), you must fill out a report for each of your establishments. To add a new establishment, refer to [Screens 79 – 84](#).



## List of report types

**Type 1** – Single-establishment report; used only for companies that have one establishment/location.



## List of report types

**Type 2** – Consolidated report; contains the total employee demographics for all of your establishments combined.



## List of report types

**Type 3** – Headquarters report; contains the employee demographics for *only* your headquarters establishment.



## List of report types

**Type 4** – For an establishment with more than 50 employees; contains employee demographics.



## List of report types

**Type 6** – For an establishment with less than 50 employees; contains only the establishment name, address and total number of employees for the establishment.

(See [Screen 64](#) for additional information regarding Type 6 reports).



## List of report types

**Type 7** – Reconciliation report. This report will inform you if there are any data entry errors in your survey. This report is only applicable to you if you have any Type 6 reports.

See [Screens 94 – 96](#) for additional information regarding the reconciliation report.



## List of report types

**Type 8** – For an establishment with less than 50 employees; contains employee demographics.

(See [Screen 64](#) for additional information regarding Type 8 reports).



## List of report types

If you choose to use Type 6 reports, the numbers for your Type 3, 4, and 6 reports will not auto-populate the data entered into your Type 2 report. You will need to go into your Type 2 report and manually input all the data from each of your reports.

If you choose to use Type 8 reports, the numbers from all of your establishments will auto-populate the data-entered into your Type 2 report (and the system will prevent you from entering the numbers yourself). **You can only use Type 6 or Type 8 reports, not both.**



## List of report types

To switch from a Type 6 report to a Type 8 report (or vice versa), send a request by email with your company ID number and contact information to [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov).



# Step 1: Complete Online Form

Screen 66

## Entering your data

To begin filling out information for a report, under the “Action” heading select “Edit”, and then click “Go” for the establishment you would like to work on.

4	I	<div><div>Edit ▼</div><div>Go</div></div>	GX91460	THE ESTABLISHMENT	23232 ADDRESS ST	VA	FAIRFAX	
---	---	---	---------	-------------------	------------------	----	---------	--

Clicking “Go” here will take you to this specific establishment’s report.



# Step 2: Complete Online Form

Screen 67

## Entering your data

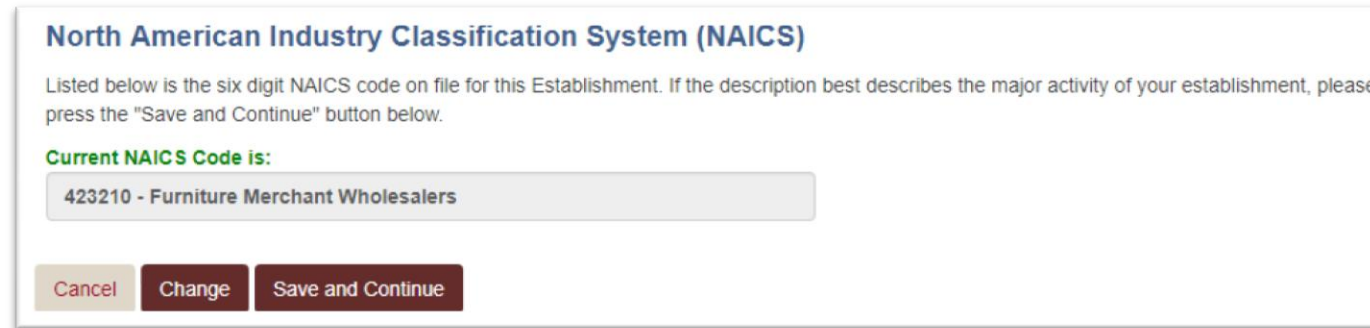
Establishment for which this report is filed* ⓘ		Employer Identification Number (EIN)* ⓘ	
TEST COATINGS		11-1191518	
<p>If you need to update the establishment's address, begin by entering the full address in the Address 1 cell. As you enter your address, suggestions will be provided. Continue to add information until your address appears in the drop-down list. Select your address to continue. If the correct address does not appear, or if you are entering a PO Box, please click on "Manual Address Entry" and enter the address in the provided cells. <b>PLEASE NOTE:</b> If the address search results in incorrect or incomplete information please use the "Manual Address Entry" to enter your address information.</p>			
Address (Use Manual Entry for P.O.Box)			
Address (number and street) - Note: Second line is optional.* ⓘ		Address 2 (Optional) ⓘ	
13BB TEST AVENUE			
City or Town* ⓘ	County* ⓘ	State* ⓘ	Zipcode* ⓘ
TYSONS	FAIRFAX COUNTY	VA	22182
Manual Address Entry			

Verify that the information in all fields are correct and click “Save and Continue”. If the address is incorrect, click the address box to edit it (See [Screen 12](#) for more information on how to edit address).



## Entering your data

Enter your NAICS code in the box. Then click “Save and Continue”. If you do not know your NAICS code, see the following screen for guidance.

A screenshot of a web form titled "North American Industry Classification System (NAICS)". The text inside the form reads: "Listed below is the six digit NAICS code on file for this Establishment. If the description best describes the major activity of your establishment, please press the 'Save and Continue' button below." Below this text, it says "Current NAICS Code is:" followed by a text box containing "423210 - Furniture Merchant Wholesalers". At the bottom of the form are three buttons: "Cancel", "Change", and "Save and Continue".

**North American Industry Classification System (NAICS)**

Listed below is the six digit NAICS code on file for this Establishment. If the description best describes the major activity of your establishment, please press the "Save and Continue" button below.

**Current NAICS Code is:**

423210 - Furniture Merchant Wholesalers

[Cancel](#) [Change](#) [Save and Continue](#)

The North American Industry Classification System (NAICS) is the standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.

## Entering your data

You can search for your NAICS code by typing key words or numbers, and then selecting the option from the drop-down menu that best describes your establishment's industry.

Please search and build a six digit NAICS code for this Establishment by selecting the best one which describes the major activity of your establishment.

- 211120 - Crude Petroleum Extraction
- 211130 - Natural Gas Extraction
- 212111 - Bituminous Coal and Lignite Surface Mining
- 212112 - Bituminous Coal Underground Mining
- 212113 - Anthracite Mining
- 212210 - Iron Ore Mining**
- 212221 - Gold Ore Mining
- 212222 - Silver Ore Mining
- 212230 - Copper, Nickel, Lead, and Zinc Mining
- 212291 - Uranium-Radium-Vanadium Ore Mining
- 212299 - All Other Metal Ore Mining
- 212311 - Dimension Stone Mining and Quarrying
- 212312 - Crushed and Broken Limestone Mining and Quarrying
- 212313 - Crushed and Broken Granite Mining and Quarrying
- 212319 - Other Crushed and Broken Stone Mining and Quarrying
- 212321 - Construction Sand and Gravel Mining
- 212322 - Industrial Sand Mining

# Step 4: Complete Online Form

Screen 70

## Entering your data

Enter the correct number of employees for each relevant row and column.

Totals will add up on their own.

Job Categories	Number Of Employees														
	Race/Ethnicity														
	Hispanic or Latino		Not Hispanic or Latino												
			Male						Female						
	Male	Female	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or More races	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races	Overall Totals
Executive/Senior Level Officials and Managers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
First/Mid-Level Officials and Managers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Professionals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Technicians	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sales Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Administrative Support Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Craft Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Operatives	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Laborers and Helpers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Service Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Previous year total															



## Entering your data

If a category has no employees, you may leave the box blank or put a “0”.

Categories	Male
Executive/Senior Level Officials and Managers	<input type="text"/>

Categories	Male
Executive/Senior Level Officials and Managers	<input type="text" value="0"/>

Both instances here are correct.

# Step 4-B: Complete Online Form

Screen 72

## Entering your data

### EXAMPLE:

If the establishment has seven Hispanic/Latino males whose jobs categorize as “Executive/Senior Level Officials and Managers”, put “7” in column 1, row 1.

Job Categories	Number Of Employees														Overall Totals	
	Race/Ethnicity															
	Hispanic or Latino		Not Hispanic or Latino													
			Male						Female							
	Male	Female	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or More races	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races		
Executive/Senior Level Officials and Managers	7	0	0	0	0	0	0	0	0	0	0	0	0	0	7	



## Entering your data

**NOTE:** After 15 minutes, the system will automatically log out unless you click the “Save” or “Save and Continue” button at the bottom. You can see your timer at the top of the matrix.

Section will be closed if you do not hit **Save** or **Save & Continue** in **14** minutes and **38** seconds.

Job Categories	Number Of Employees														
	Race/Ethnicity														
	Hispanic or Latino		Not Hispanic or Latino												Overall Totals
			Male						Female						
	Male	Female	White	Black or American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or More races	White	Black or American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races	



## Entering your data

Clicking “Save” will save your work and restart the timer at the top of the page.

Clicking “Save & Continue” will save your work and take you to the next step.

Clicking “Cancel” will take you back to the screen containing your list of establishments without saving your progress.



### Entering your data

**Government Contractor?**

Does the company or any of its establishments (a) have 50 or more employees AND (b) is not exempt as provided by 41 CFR 60-1.5, AND either (1) is a prime government contractor or first-tier subcontractor, and has a contract, subcontract, or purchase order amounting to \$50,000 or more, or (2) serves as a depository of Government funds in any amount or is a financial institution which is an issuing and paying agent for U.S. Savings Bonds and Savings Notes?

☒ Yes ☐ No

If the response to the above question is Yes, please enter your Dun and Bradstreet identification number (if you have one):

Select “Yes” if the company or any of its establishments (a) have 50 or more employees AND (b) is not exempt as provided by 41 CFR 60-1.5, AND either (1) is a prime government contractor or first-tier subcontractor, and has a contract, subcontract, or purchase order amounting to \$50,000 or more, or (2) serves as a depository of Government funds in any amount or is a financial institution which is an issuing and paying agent for U.S. Savings Bonds and Savings Notes. Select “No” if not.

If you selected “Yes”, enter your establishment’s Dun and Bradstreet identification number if you have one. This number is a unique nine-digit identifier for businesses used to establish a business credit file, which is often referenced by lenders and potential business partners to help predict the reliability and/or financial stability of the company in question.



## Entering your data

Select the dates of the pay period used for the report. The dates used should encompass the start date of the desired pay period and the end date of the desired pay period. The starting date must be earlier than the ending date.

Date(s) of pay period used:

October ▼	01	2018	to	October ▼	15	2018
-----------	----	------	----	-----------	----	------

Example of a selected pay period (October 1, 2018 to October 15, 2018).

**NOTE:** You may only use data pulled from any one pay period in October, November *or* December of the reporting year.

## Entering your data


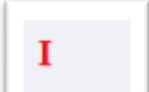
### Remarks

Use this item to give any identification data appearing on the last EEO-1 report which differs from that given above. Explain major changes in the composition of reporting units and other pertinent information.

The Remarks section is to add anything you feel is noteworthy, regarding the establishment. Otherwise, you may leave it blank.



## Entering your data

Finally, click “Save and Continue”. You will be taken back to the page with your list of establishments. Under the “Status” column for the establishment you finished, you will see a  for “Complete”. Reports with an  for “Incomplete” will need to be completed.

\*If you are a single-establishment company, when you click “Save and Continue”, you will be taken to the certification screen ([Screen 91](#)).

## Adding a new establishment

If your company has new establishments/locations, you must file for those establishments as well.

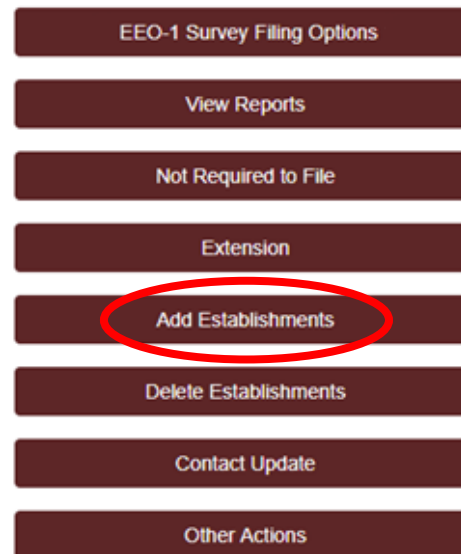
**NOTE:** If the establishment was obtained by an acquisition or merger, you must follow a different process. See [Screens 118 – 123](#) for instructions regarding an acquisition or merger.



## Adding a new establishment

There are two ways you can add a new establishment:

The first is from the main menu screen right after you log in. Select the “Add Establishments” button.



## Adding a new establishment

The second is from the screen with your list of establishments. From the main menu after logging in, click “EEO-1 Survey Data Filing Options” and select “Complete Online Form”. Near the top under the section “Add New Establishments”, select the button that says “click here”.

### Edit and Complete Establishment Reports

To certify your EEO-1 survey you will first have to complete each of your establishments. **Type 2 Consolidated Report will be the last to complete before certification.** When establishments are complete they will be marked with a **green "C"** in the Status column, whereas incomplete reports will be marked with a **red "I"**. When you are ready to complete information for a specific establishment please select "Edit" from the drop-down menu located directly to the left of the establishment number you would like to complete and press the "Go" button located next to this drop-down menu.

#### Delete Establishment:

If you need to delete an establishment please select "delete" from the drop down menu located directly to the right of the establishment number you would like to delete and press the "Go" button located next to this drop down menu.

#### Add New Establishments:

If you need to file for a new establishment please [click here](#)

## Adding a new establishment

**Add Establishments**

Do you have any new establishments?

☒ Yes ☐ No

Select the report type that applies to the location you are adding.

Greater than 50 employees.

Type	Description
<input checked="" type="radio"/> 4	Individual establishment with more than 50 employees.

Less than 50 employees.

Type	Description
<input type="radio"/> 8	Individual establishment with less than 50 employees. This report is the same as a Type 4 report and requires the listing of employees under the correct gender, race and job description category. The totals from these reports will automatically be calculated for the Consolidated Report.
<input type="radio"/> 6	Individual establishment with less than 50 employees. This report requires only the address and total quantity of employees for each establishment. Also, when using Type 6 reports, the consolidated Type 2 report must reflect the total amount of employees from all your locations.

Select a type of report to fill out. The number of employees in the establishment you are adding will determine what type of report you should choose. For more information regarding report types, refer to [Screens 57 – 65](#).

## Adding a new establishment

Has an EEO-1 report been filed for this Establishment in the past?

☐ Yes ☒ No

[Continue](#)

If you have filed a report for this establishment in the past and have the establishment number for it, click “Yes”, then enter the number into the box that appears, and click “Continue”.

If you have not, click “No” and then “Continue”. The establishment will be marked as “New”, and will receive an establishment number at a later date.

# Step 4: Complete Online Form

Screen 84

## Adding a new establishment

Enter the establishment's name, EIN, NAICS code and address. See [Screen 12](#) for more information on entering your company address.

Click “Save And Add Another” to add another establishment, or “Save”, if that is the one establishment to be added.

The screenshot shows a web form titled "Establishment for which this report is filed". It includes fields for "Employment Identification Number (EIN)", "Naics" (with a link to view NAICS Codes), and "Address". The address section has a "Manual Address Entry" option. At the bottom, there are three buttons: "Cancel", "Save", and "Save And Add Another".

Establishment for which this report is filed\*

Please enter your Establishment Name

Employer Identification Number (EIN)\* ( )

Naics\* ( ) ( For reference click here to view NAICS Codes.)

XX-XXXXXXX Search Naics code

Begin entering the establishment's full address in the Address 1 cell. As you enter your address, suggestions will be provided. Continue to add information until your address appears in the drop-down list. Select you address to continue. If the correct address does not appear, or if you are entering a PO Box, please click on "Manual Address Entry" and enter the address in the provided cells.

Address (Use Manual Entry for P.O. Box)

Address (number and street)\* ( )

Address 2 (Optional)\* ( )

Enter a location

City or Town\* ( )

County\* ( )

State\* ( )

Zipcode\* ( )

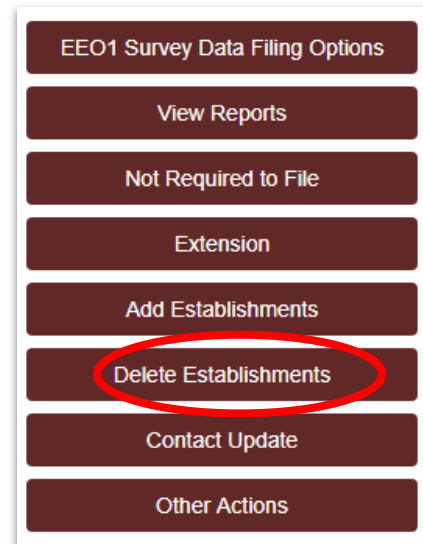
Manual Address Entry

Cancel Save Save And Add Another



## Deleting an establishment

The first method for deleting an establishment can be accessed from the main menu screen right after you log in. Select the “Delete Establishments” button.



## Deleting an establishment

From there, you will be asked if your company has closed any establishments since the previous survey year.

1. Has your company closed any establishments since last survey filing?

☐ Yes ☐ No

Select “Yes”, and a list of your establishments will appear. Click the boxes next to the establishments you would like to delete, and from the dropdown menu underneath the box, choose the reason that best answers why the establishment is closed. When you’re done, click “Save” and the establishment will be deleted.

## Deleting an establishment

The second deletion method is from the screen with your list of establishments.

From the main menu after logging in, click “EEO-1 Survey Data Filing Options” and select “Complete Online Form”. Under the “Action” column next to the establishment you want to delete, click the dropdown menu and select “Delete”. Then click the “Go” button.

4	I	<div>Delete ▼</div>	Go	GX91608	TEST ENTERPRISE TECHS	2070 NORTHBROOK BLVD SUITE A 1	SC	CHARLESTON	89
---	---	---------------------	----	---------	-----------------------	--------------------------------	----	------------	----

## Deleting an establishment

Select the best reason for the establishment closing, then click “Mark as Closed”. The establishment will now be deleted.

<input type="radio"/>	This Establishment Closed/This Establishment is Out of Business.
<input type="radio"/>	This Establishment has been spinoff and is now independent of this company.
<input type="radio"/>	This Establishment was involved in an acquisition or merger.
<input type="radio"/>	Closed as Type-4 and Reported as Type-6.
<input type="radio"/>	This Establishment was consolidated into another Establishment. a) Due to NAICS/EIN/Address/Client Site issue. b) Due to company restructuring. c) Due to deletion of teleworker to be placed into Establishment they report to.

Cancel

Mark as Closed



## Deleting an establishment

**NOTE:** For both deletion techniques, you will not be able to delete your Type 2 Consolidated report or your Type 3 Headquarters report.



## Certification

You have completed data for all establishments. Please view the consolidated report to check for accuracy. Once you have finished adding establishments and your data is accurate, please press the Certify Reports button.

Certify Reports

On the page with your list of establishments, if all of your reports have been marked as complete, you will see this message at the top of the screen. Click the “Certify Reports” button to proceed with certifying your reports.

### Certification

Certifying Official	TESTSAY GREENSTEST
Title	SR HR ANALYST
Total Number of Reports	81
Total Number of Closed Establishment	72

These establishments had major changes in data when compared to last year's submission:

Establishments with at least a 35% change in employee counts from previous year	1
Establishments with a substantial change from previous year regarding the ratio of Male vs. Female employees	0
Establishments with a substantial change from previous year regarding the ratio of White vs. Minority employees	1
Establishments with a substantial change from previous year in the distribution of employees in Minority categories	0

Certification

☐ All statements are accurate and were prepared in accordance with the instructions.

Cancel

Certify

All reports and information obtained from individual reports will be kept confidential as required by section 709(e) of Title VII. Willfully false statements on this reports are punishable by law, U.S. Code, Title 18, Section 1001.

Verify that all the information shown on this page is correct. If you need to edit the Certifying Official information, you may do so by going to the main menu and clicking on the “Contact Update” button.

## Certification

Before checking the box to certify your survey, please note all reports and information obtained from individual reports will be kept confidential as required by section 709(e) of Title VII. Willfully false statements on these reports are punishable by law, U.S. Code, Title 18, Section 1001.



## Certification

Finally, check the box certifying that all data inputted is accurate, then click the “Certify” button. Your EEO-1 survey is now complete!



If you currently have any Type 6 reports, a reconciliation report will appear in your list of establishments to show you if there are any errors in the data you have inputted in the matrices.

The reconciliation report will not appear if you have chosen to use Type 8 reports for establishments with fewer than 50 employees.



# Step 1: Reconciliation Report

Screen 95

Click the “Go” button under the “Action” column for the reconciliation report to determine where errors exist. You will be taken to a matrix that shows the breakdown of these errors.

In this example, under column 2, row 3, there are 10 Hispanic female technicians that appear to be missing.

Job Categories	Number Of Employees														
	Race/Ethnicity														
	Hispanic or Latino		Not Hispanic or Latino												Overall Totals
			Male						Female						
	Male	Female	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or More races	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races	
Executive/Senior Level Officials and Managers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
First/Mid-Level Officials and Managers	-	-	-	-	-	-	-	-	-	-	-	-	-71	-	-
Professionals	-	-10	-	-	-	-	-	-	-	-	-	-	-	-	-
Technicians	-	-	-	-	-	-	-	-	-	-50	-	-	-	-	-
Sales Workers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Administrative Support Workers	-	-	-25	-	-	-	-	-	-	-	-	-	-	-	-
Craft Workers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Operatives	-	-	-	-	-	-	-21	-	-	-	-	-	-	-	-
Laborers and Helpers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Service Workers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-



- It is best to go through your reports and ensure that any unaccounted for employees were not simply placed in the wrong category.
- Remember that your Type 2 Consolidated report must show the complete breakdown of employees from all of your establishments. As such, the total number of employees in your Type 2 Consolidated report must equal the total number of employees from your Type 3, 4, and 6 reports combined.

Once you have fixed the data, the negative numbers in the reconciliation report matrix will be cleared, and you will be able to certify your reports.



### 25% deletion warning

Please answer 'Yes' or 'No' to describe why establishments were deleted.

1. Was at least one establishment deleted due to being a spinoff?

☐ Yes ☐ No

2. Was at least one establishment deleted due to being sold to, merged into, or acquired by another company?

☐ Yes ☐ No

3. Does at least one establishment deleted still exist and have at least one employee working there on a regular basis? (Excluding residential teleworkers)

☐ Yes ☐ No

4. Were all of these establishments deleted due to being closed, out of business, loss of contract, or restructuring of the company?

☐ Yes ☐ No

If you have deleted 25% or more of your company's establishments, this screen will appear when you attempt to certify your reports.

Answer the questions to ensure that the establishments were correctly deleted, then click "Next".

## Multi-establishment to single-establishment warning

If you attempt to certify your reports, but only have a Type 2 and Type 3 report in your list of establishments, you will see a message on the screen stating that your reports are incomplete. If you only have the one location to report for, send an email to [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov) stating this, so that your company can be switched from a multi-establishment to a single-establishment in the EEO-1 online system.

If you have other establishments to report, refer to [Screens 79 – 84](#) to add these establishments.



# Filing for the First Time

Screens 99 – 108

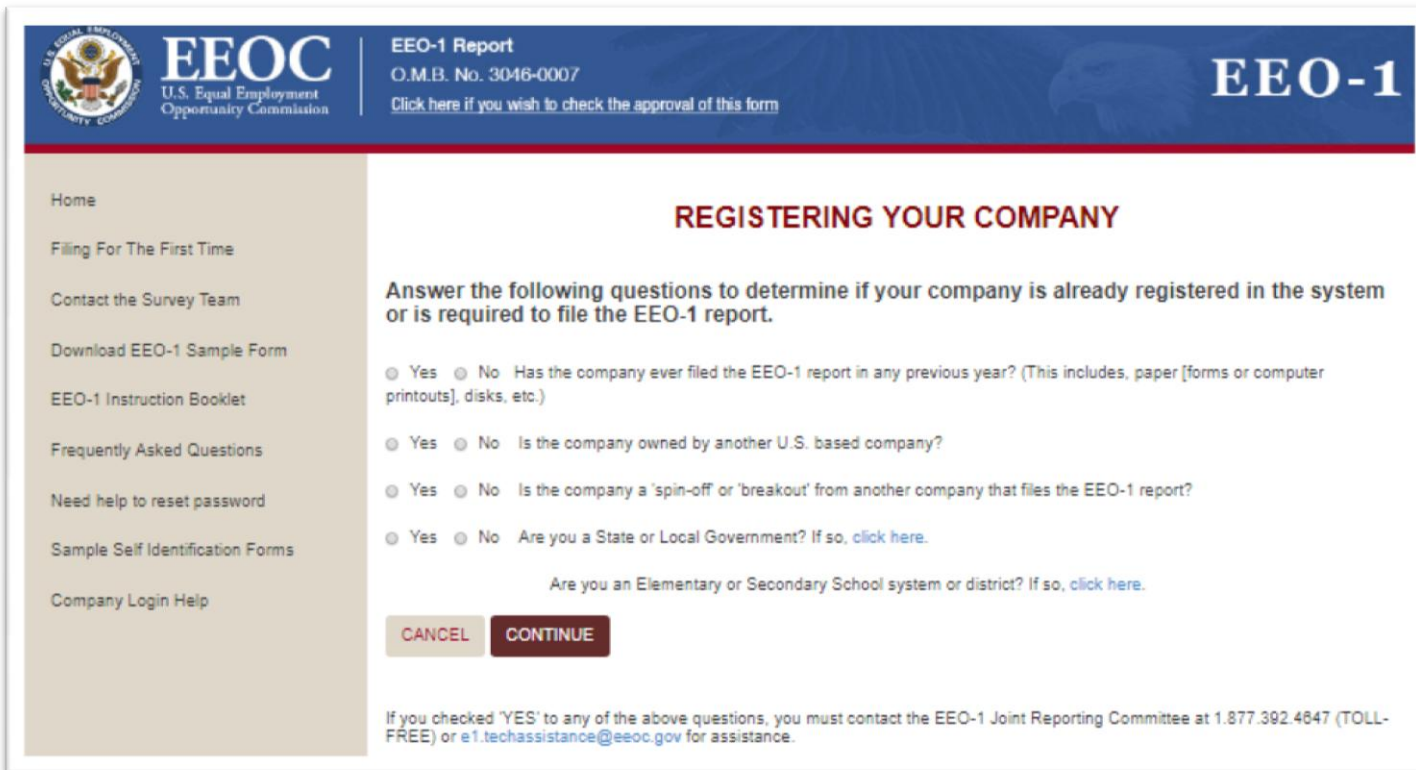
## Navigate to registration page

If your company has never filed an EEO-1 survey, you will need to register your company in the EEO-1 online system.

Navigate to <https://egov.eeoc.gov/eo1/register.jsp> to start your company's registration.



## Registration questionnaire



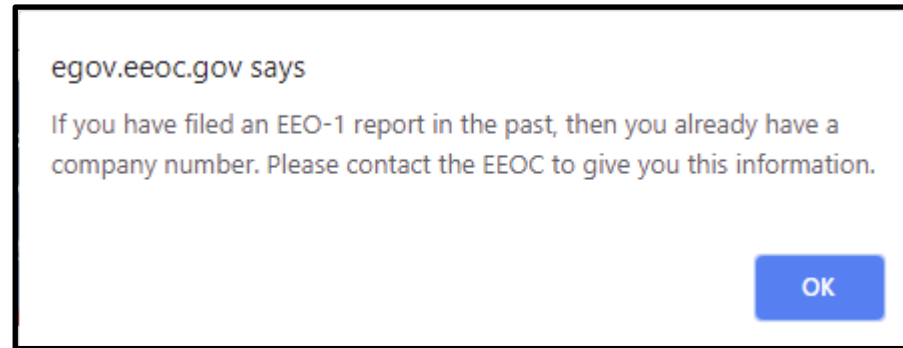
The screenshot shows the EEOC EEO-1 Report registration page. The header includes the EEOC logo, the text "EEO-1 Report O.M.B. No. 3046-0007", and a link to check the approval of the form. The main heading is "REGISTERING YOUR COMPANY". Below this, it asks the user to answer questions to determine if their company is already registered or required to file. The questions are:

- ☐ Yes ☐ No Has the company ever filed the EEO-1 report in any previous year? (This includes, paper [forms or computer printouts], disks, etc.)
- ☐ Yes ☐ No Is the company owned by another U.S. based company?
- ☐ Yes ☐ No Is the company a 'spin-off' or 'breakout' from another company that files the EEO-1 report?
- ☐ Yes ☐ No Are you a State or Local Government? If so, [click here](#).

Below the questions, it asks: "Are you an Elementary or Secondary School system or district? If so, [click here](#)." At the bottom, there are "CANCEL" and "CONTINUE" buttons. A footer note states: "If you checked 'YES' to any of the above questions, you must contact the EEO-1 Joint Reporting Committee at 1.877.392.4647 (TOLL-FREE) or [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov) for assistance."

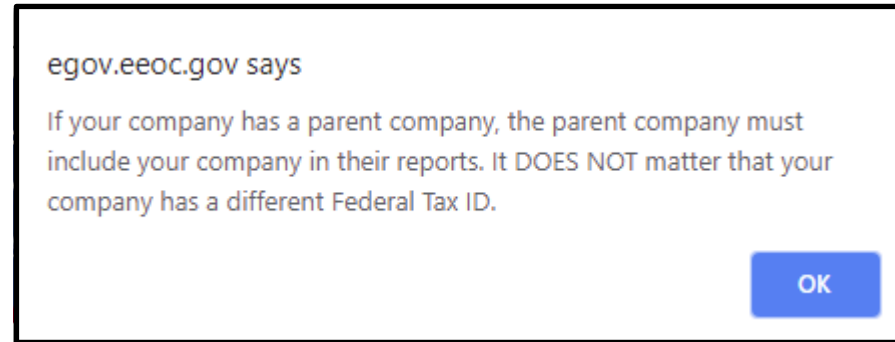
Answer the following questions, then click “Continue”. Your answers to this page will determine if your company is already registered or if it is required to file the EEO-1 survey. The system will not let you continue if you select “Yes” for any of the questions. A message will pop up explaining why.

## Registration questionnaire



If you get the message after answering 'Yes' to the first question it is because your company has previously filed an EEO-1 report, and you do not need to re-register your company. If you do not know your login information, you can obtain this information by going to the login page at <https://egov.eeoc.gov/eo1/login.jsp>. Click on “Forgot Password?” to get your password, and “Forgot Company Number?” to get your company number.

## Registration questionnaire

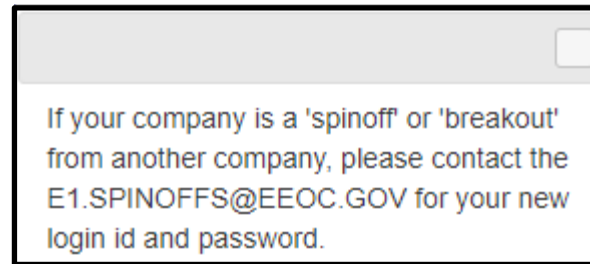


If your company received the above message after answering 'Yes' to the second question it is because you indicated your company has a parent company. The parent company is responsible for filing for your company under their own EEO-1 survey, even if both companies have different Federal Tax IDs.

If your company is now completely independent from your parent company, please refer to [Screens 124 – 125](#) regarding spinoffs.



## Registration questionnaire



If your company received the above message after answering 'Yes' to the third question it is because your company has spun off from another company and is now completely independent of them. You will need to contact the spinoffs department. Refer to [Screens 124 – 125](#) regarding spinoffs.

## Registration questionnaire

If your company received this message after answering 'Yes' to the fourth question it is because it is either a government, or is an elementary or secondary school system. You are not required to file the EEO-1 survey. You will be responsible for a different survey altogether.

egov.eeoc.gov says

According to the information you have provided, your company should not complete an EEO-1 report.

OK

For further information regarding state and local governments please see:

<https://egov.eeoc.gov/eeo4/>

For further information regarding public school districts please see:

<https://egov.eeoc.gov/eeo5/index.htm>



## Registration questionnaire

**REGISTERING YOUR COMPANY**

Answer the following questions to determine if your Company is required to file the EEO-1 report.

☐ Yes ☐ No Does the company employ 100 or more employees?

☐ Yes ☐ No Does the company have over 50 employees and has a federal contract or subcontract amounting to \$50,000 or more?

☐ Yes ☐ No Does the company have over 50 employees and serve as an issuing and paying agent for U.S. Savings Bonds?

After answering the initial three questions to see if you should register your company, you must answer a second set of questions that will determine if you are required to file the EEO-1 report for the survey year. Answering “Yes” to any of the three questions means you are required to file. Click “Continue” to proceed with registration.

Answering “No” for all three questions means you are not required to file. You do not need to do anything else.

### Registration form


Fill in the fields regarding your company's and company contact person's information. The contact person serves as your company's contact for all matters regarding the EEO-1 survey. See [Screen 12](#) for more information on entering your company address. When done, click the "Submit" button.

Afterwards, your company number/login ID will appear on the following screen. Be sure to save that information as it will not appear again. If you need your company number again, you will need to follow the steps in [Screens 110 – 111](#).

**REGISTERING YOUR COMPANY**


This registration is for the 2017 survey period. If you do not plan to file 2017 reports, do not submit this form. After clicking "Submit," your Company Number/Login ID will appear on the following screen. Be sure to save that information.


COMPANY INFORMATION:


Company Name \* 


Please provide your mailing address below. As you enter your address, suggestions will be provided. Continue to add information until your address appears in the drop-down list. Select your address to continue. If the correct address does not appear, please click on "Manual Address Entry" and enter the address in the provided calls. For PO Boxes please use Manual Address Entry.


Address (Use Manual Entry for P.O. Box)


Address Line 1 \* 

Address Line 2 (Optional) 


City or Town \* 


County \* 

State \* 


Zip Code \* 


Manual Address Entry


Employer Identification Number (EIN) \* 


Number of locations for your Company \* 

CONTACT INFORMATION FOR YOUR EEO-1 REPORT :


Name \* 


Telephone Number \* 

E-Mail \* 

Confirm E-Mail \* 

REGISTERING PERSON INFORMATION:

Name \* 

☐ I'm not a robot 

[Privacy](#) [Terms](#)

## Registration confirmation

You will be taken to a page confirming your company's successful registration. You may print this information for your records by clicking the "Print This Page" button.

**EEO-1 Registration Confirmation**

Congratulations! You are now ready to begin your EEO-1 Survey. Please PRINT and KEEP a copy of this screen for your records.

**Please check your email to obtain your password for logging in to the EEO-1 Survey**

Company Name : TEST WORLD  
Company number : HP50842  
Address : 11254 LEESBURG PIKE, HERNDON, FAIRFAX, VA-20170  
Contact person : MR. TEST  
Contact phone : (457) 891-5555  
Contact email : [REDACTED].COM  
Registered By : MR. TEST  
Login Id : HP5084  
[REDACTED]

[Print This Page](#)

To begin filing your EEO-1 Survey, please click on the "Login" [Link Login](#)

To obtain your password, check your email for a link which you must click to create your password (see [Screen 7](#) for more help with this). After creating your password you can proceed to the login screen and begin your EEO-1 Survey.

**Once you have your company number and password, you can click here to log in.**

# Alternate Login Scenario

Screens 109-116


### Get company number

If your company has not received its 2018 notification letter or is unable to locate its company number/login ID and password for any reason, please follow these steps. To obtain your company number click on “Forgot Company Number?” on the login page.

Login ID/Company Number:  [Help!](#)

Password:  [Help!](#)

Retype the characters from the picture:



[Login](#)

[Get Password](#) [Forgot Password?](#) [Forgot Company Number?](#)

### Get company number

After clicking “Get Company Number” you will be directed to a new screen.

Enter your company name, company's primary zip code, and your contact person's email address. Your company number will then be emailed to your company's contact person.

Company Name:

Zip Code:

EEO-1 Contact Person Email ID:

Fill in your company's name, zip code, and contact person's email address. The contact person's email is the email we have on file for your company and is where your company number/login ID information will be sent, once you click “Submit”. For information on updating the contact person see the following screen ([Screen 112](#)).

## Update contact person

You may change your Contact Person Email ID by sending the EEOC a signed change request on company letterhead with the company number/login ID (if known), name, title, phone number and email address of the new contact person at your company. This change request **MUST** be signed by an authorized company representative (anyone in your company authorized to sign documents) in order for the change request to be processed.

Please either scan and email this request to [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov) or fax to 1-866-262-0032. Your new contact will receive an email with a new temporary password once your change request has been submitted. If you have any questions about this process you may contact the EEOC at 1-877-392-4647 or [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov).




## Get password

In order to get your 2018 password click on “Get Password” on the EEO-1 login page.

Login ID/Company Number:  [Help!](#)

Password:  [Help!](#)

Retype the characters from the picture:



[Login](#)

[Get Password](#) [Forgot Password?](#) [Forgot Company Number?](#)

## Get password

After Selecting “Get Password” you will be directed to a new screen.

Enter your Company Number/Login ID below. A link for resetting your password will be emailed to your company's Contact Person.

Login ID/Company Number:	<input type="text"/>	<a href="#">Help!</a>
Email Address	<input type="text"/>	
<a href="#">Send Password Reset Link</a>		

Input your company number/login ID into the field and click “Send Password Reset Link”.

## Get password

At this point your contact person will receive an email with a link to create your password. Please refer back to [Screen 112](#) for information on updating your contact person.

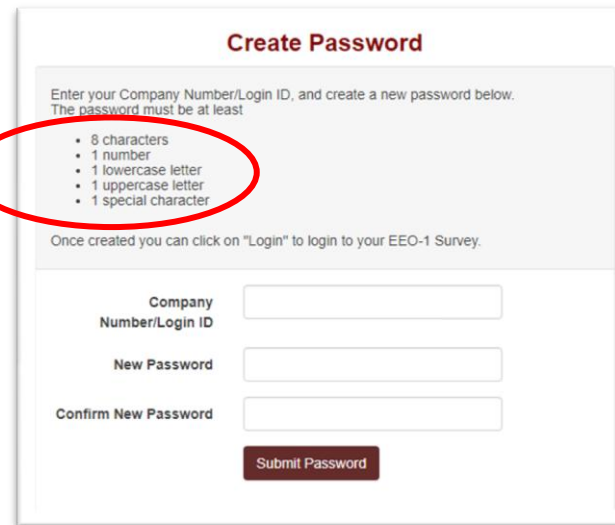
Click the link in the email (URL will be unique to you). You will be taken to a page where you can reset your password.



## Get password

Enter your company number/login ID, and create your new password. Re-enter your new password in the “Confirm New Password” field, then click “Submit Password” to finish creating your password.

**Make sure to follow these password specifications**



The screenshot shows a web form titled "Create Password". It contains the following elements:

- Title:** Create Password
- Instructions:** Enter your Company Number/Login ID, and create a new password below. The password must be at least
- Password Requirements (circled in red):**
  - 8 characters
  - 1 number
  - 1 lowercase letter
  - 1 uppercase letter
  - 1 special character
- Additional Info:** Once created you can click on "Login" to login to your EEO-1 Survey.
- Input Fields:**
  - Company Number/Login ID
  - New Password
  - Confirm New Password
- Submit Button:** Submit Password

After pressing “Submit Password” you can navigate to the login page: <https://egov.eeoc.gov/eeo1/login.jsp> and login with your new password.

# Appendix

Screens 117 – 133

Notes, Definitions, FAQs and Links

# Acquisitions

## Acquisition

An acquisition is a corporate action in which a company buys most, if not all, of the target company's ownership stocks in order to assume control of the target firm.



# Acquisitions

If your company has undergone an acquisition, send an email to [E1.ACQUISITIONSMERGERS@EEOC.GOV](mailto:E1.ACQUISITIONSMERGERS@EEOC.GOV).

Your email should include the **name, address, and company number/login ID of both the acquiring and the acquired companies.**



# Acquisitions

If a company acquired a small company that otherwise would not be required to file the EEO-1 report, or a company that has not previously filed the EEO-1 report, the acquiring company may proceed with adding the establishment(s) as a new establishment.



# Acquisitions

## Asset Acquisition

An asset acquisition is the purchase of a company by buying its assets instead of its stock.

If an establishment of your company was acquired through an asset acquisition, you do not need to report for that establishment/location.



# Mergers

A merger is a legal consolidation of two entities to form a new entity.



# Mergers

If your company has undergone a merger, send an email to [E1.ACQUISITIONSMERGERS@EEOC.GOV](mailto:E1.ACQUISITIONSMERGERS@EEOC.GOV).

Your email should include the names and company numbers/login IDs (if known) of all companies affected by the merger, the name and address of the corporate headquarters and the name of the new company.



# Spinoffs

A **spinoff** occurs when an establishment(s) from one company forms a new company that will file independently from its former parent company.

If your company has undergone a spinoff, send an email to [E1.SPINOFFS@EEOC.GOV](mailto:E1.SPINOFFS@EEOC.GOV).



# Spinoffs

Your email should include the name, address, and company number (if known) of the current parent company.

Additionally, please include the establishment considered to be the new headquarters that should be spun off in the employer EEO-1 database with a list of all physical addresses for the new company.



## Regarding PEOs

A **Professional Employer Organization (PEO)** provides human resource services for their small business clients—paying wages and taxes and often assisting with compliance of a myriad state and federal rules and regulations.

A PEO must report for all establishments of the companies they are filing for. They may not simply file a multi-establishment company as a single Type-4 establishment.



# Regarding PEOs

**Q.** *We are a PEO, do we file for our clients under our company number as establishments or do we file for each as a separate entity with its own company number?*

**A.** As a PEO you will report your clients as establishments under your PEO's Company Number.

**Q.** *As a PEO many of our clients are companies that do not meet the requirements to file individually. Should they be included in our EEO-1? If so, how should they be reported?*

**A.** Client companies of a PEO that on their own are not subject to EEO-1 filing requirements are excluded from the PEO's EEO-1 reports.



# Regarding PEOs

**Q.** *Our PEO dropped service to a client, how do we treat this establishment?*

**A.** Establishments that previously had been reported by a PEO but no longer, and do not meet the requirements to file individually, must be deleted. If employees appear at these establishments later, assigned unit numbers that were deleted may be retrieved. However, if the establishment does meet the requirements to file you will need to contact [e1.spinoffs@eeoc.gov](mailto:e1.spinoffs@eeoc.gov).

**Q.** *Our PEO has several clients who we handle. These clients fall under our PEO EIN number and we report payroll and taxes for these client/employees. When submitting them on the EEO-1 report, do I use our company EIN number for ALL clients OR do I use the EIN number of each client when submitting the report?*

**A.** If the establishments fall under your PEO's EIN for payroll and taxes you will use the PEO's EIN for all establishments.



# Troubleshooting/FAQs

**Q.** *How do I change/update my contact person information?*

**A.** If your EEO-1 contact person information has changed, submit a letter on company letterhead signed by an authorized company representative, indicating the updated contact's name, title, phone number and email address to the EEOC Employer Data Team at [E1.TECHASSISTANCE@EEOC.GOV](mailto:E1.TECHASSISTANCE@EEOC.GOV). Please remember to include your company number (if known) in your request.

**Q.** *When I try to log in, it says the information I entered is invalid.*

**A.** Double-check to ensure that you are inputting your password without any spaces in it (manually typing in your password can help). Additionally, remember that the password you used for the EEO-1 report in previous years will no longer work for the new reporting year. For information on logging in with new company number/login ID and password please see [Screen 6](#).

**Q.** *Do public non-profit, tax-exempt establishments need to file the EEO-1 report?*

**A.** Yes.



# Troubleshooting/FAQs

**Q.** *I'm trying to add a new establishment, but I got an error that says "Error: EIN already in use".*

**A.** This error means this same EIN is already in use by another company completing their EEO-1. Please email [E1.TECHASSISTANCE@EEOC.GOV](mailto:E1.TECHASSISTANCE@EEOC.GOV) with your company number/login ID and the establishment you are trying to create, along with the EIN you attempted to enter.

**Q.** *I received two different login IDs for my company. Which one should I use?*

**A.** If you received two different login IDs, your company may have accidentally been registered in the system twice. Send an email to the acquisitions and mergers department at [E1.ACQUISITIONSMERGERS@EEOC.GOV](mailto:E1.ACQUISITIONSMERGERS@EEOC.GOV) with your contact information and both login IDs, and they will help correct the issue.

**Q.** *My employee regularly reports to two different establishments. Which establishment should I report the employee under?*

**A.** Report the employee to the establishment at which they spend the majority of their time. If it is equal, you may choose which establishment to report them under. You may not report them in both establishments.



# Troubleshooting/FAQs

**Q.** *How do I report for employees that work from home?*

**A.** Employees who telework, i.e., work from home, must be included in the EEO-1 report for the establishment to which they report. DO NOT indicate home addresses for these employees.

**Q.** *If my company is an employment/staffing agency, how should I report for leased employees?*

**A.** Leased Employee means a permanent employee provided by an employment agency for a fee to an outside company for which the employment agency handles all personnel tasks including payroll, staffing, benefit payments and compliance reporting. The employment agency shall, therefore, include leased employees in its EEO-1 report out of the establishment where their payroll is being handled. This will not include persons who are hired on a casual basis for a specified time, or for the duration of a specified job.

**Q.** *How do I account for seasonal or part-time employees?*

**A.** Part-time employees should be included in the EEO-1 report. Seasonal employees should not.



# Troubleshooting/FAQs

*Q. If I have employees who regularly report to an establishment, but my company does not own the establishment, do I still need to submit a report for that establishment?*

*A. Yes. You will report those employees under the address to which they report.*

*Q. Can I submit a paper copy of my EEO-1 report?*

*A. An employer who claims that preparation or the filing of Standard Form 100 would create undue hardship may apply to the Commission for a special reporting procedure. In such cases, the employer must submit **in writing** a detailed alternative proposal for compiling and reporting information to: **EEOC Employer Data Team, U.S. Equal Employment Opportunity Commission (EEOC), Office of Enterprise Data and Analytics, 131 M St., NE, Washington, DC 20507**. Only those special procedures approved **in writing** by the Commission are authorized. *Paper EEO-1 forms will be generated on request only, in extreme cases where Internet access is not available to the employer.**



# Additional Resources

EEO-1 Instruction Booklet

<https://www.eeoc.gov/employers/eeo1survey/2007instructions.cfm>

EEO-1 Frequently Asked Questions and Answers

<https://www.eeoc.gov/employers/eeo1survey/faq.cfm>

Key Terminology and Definitions

<https://www.eeoc.gov/employers/eeo1survey/terminology.cfm>

